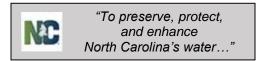


eDMR

(electronic Discharge Monitoring Report)

Facility User Management Guide

(For use by the Facility Owner and the Facility Administrator)



Last Update 12/9/2016 Revision 3.5

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Section 1. Summary of the eDMR Application

The eDMR application has the following two major areas and a guide for each.

eDMR Facility User Management Guide	Register Users			
	Manage the User Profile Information			
	Authenticate and Authorize Users			
eDMR Facility Reporting Guide	Create, Certify and Submit eDMR Reports			
	Print eDMR Reports			
	View eDMR Reports			

1.1 Facility User Management in eDMR

1.1.1 Overview of Facility Users

Facility users are able to work only with the facilities for which they have permits. Their usage of the application is governed by the user group to which they are assigned and the accompanying privileges and permissions granted to each group. See Section 1.2 – User Groups and Privileges for a chart of the Groups and related Privileges.

Facility Owner – the designated person for a specific permit/facility and/or has delegated signatory authority for the permit. (This is the person who signs the certification statement on the back of the form.)

Facility Administrator – the person(s) responsible for managing user information for the facility/permit.

Submitter – the person who submits the report. May be the owner or other delegated person that has signatory authority for the permit.

Certifier – the person certifying the data entered and corresponds to the ORC or backup ORC for this permit.

1.1.2 Basic Rules in Creating Users.

- The Facility Owner shall create the Facility Administrators for their facility.
 - The owner can only associate the Facility Administrator with permits tied to that owner and facility.
- The Facility Owner and/or Facility Administrator shall create all Facility Users for their facility.
 - The Facility Owner and Facility Administrator can only associate the Facility Users with permits associated to that Facility Owner or Facility Administrator.
- DWR must grant or revoke Submitter privileges for all users.

1.1.3 User IDs

Each User ID must be unique and will be the Facility User's email address of their choice.

When creating User IDs, it is recommended that the User ID be all lower case.

(For example: jane.doe@yahoo.com).

Write down the User ID you requested on your *User Create Request Form* here:

User ID		
---------	--	--

1.2 User Groups and Privileges

The User will be assigned to one or more of the six User Groups.

1.2.1 User Groups and Privileges Table

The table below shows each User Group and its associated User Privileges.

	Facility User Groups					
User Privileges	Owners	Facility Administrators	Submitters	Certifiers	Data Entry	View Only
Manage Facility Administrators	Х					
Manage Facility Users	Χ	Х				
Create/Update eDMR Reports	Χ	Х		Χ	Х	
Certify eDMR Reports	Х	Х		Χ		
Submit eDMR Reports to BIMS			Х			
Revise eDMR Reports	Χ	Х		Χ	Х	
View eDMR Reports	Х	Х		Χ	Х	Х
Delete eDMR Reports and Report Pages	Х	Х		Х	Х	
Import	Х	Х		Χ	Х	

A facility Owner and / or Facility Administrator can assign the facility users to the appropriate user groups. A user can be assigned to multiple groups. Users can only see the menu options for which that user has privileges.

Facility Owner – the designated contact for the permit and/or has delegated signatory authority for the permit. (This is the person who signs the certification statement on the back of the form.)

Facility Administrator – the person(s) responsible for managing user information for the facility/permit.

Submitter – the person who submits the report. May be the owner or other delegated person that has signatory authority for the permit.

Certifier – the person certifying the data entered and corresponds to the ORC or backup ORC for this permit.

To learn how to assign Groups to users, go to section 2.5 Managing User Privileges.

1.3 Activities of the Facility Owner / Administrator

The Facility Owner and Facility Administrator normally perform the activities explained in this section, however the DWR Administrator also has the authority to perform these tasks if necessary.

- Facility Owner creates the Facility Administrator
- Facility Owner can only associate the Facility Administrator to permits which are also associated to that Owner.
- Facility Owner or Facility Administrator should perform all facility user management activities except:
 - Creating the Owner
 - o Assigning users to the Submitters group (done by the DWR Administrator).
- The Owner and Facility Administrator will setup the other users and assign them to the appropriate groups for each permit specified.

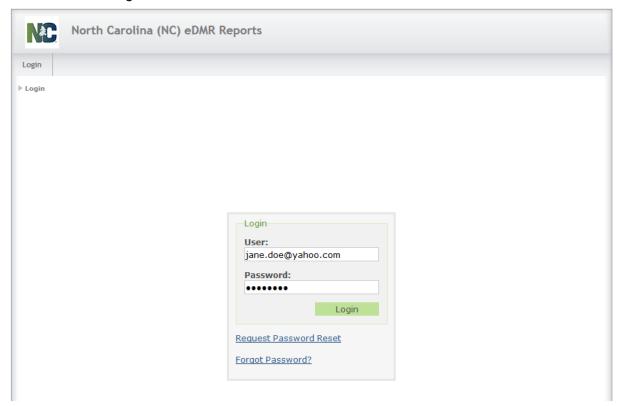
Section 2. Facility User Management

Before you begin make sure you have the DWR User Request form with your user profile and log on information. This information will be required to use the application.

2.1 Logging in to the eDMR Application

2.1.1 Login Screen

Use your internet browser and enter https://ncnode.enr.state.nc.us/nc-edmr/login.do;?m=view to access the user login screen shown below:



Enter your User ID and Password that was provided by DWR to log in to the eDMR application.

Your User ID is the email address provided to the Facility Administrator when your account was setup. (See Section 1.1.3 for more information.)

(Note: Passwords consist of a minimum of six characters, including at least one alpha and one numeric character. The user will receive a warning after three failed attempts to log in and the account will be locked after ten.)

2.2 Creating Facility Users

Only Facility Owners and Facility Administrators can create users and manage user privileges.

2.2.1 Main Menu Tabs

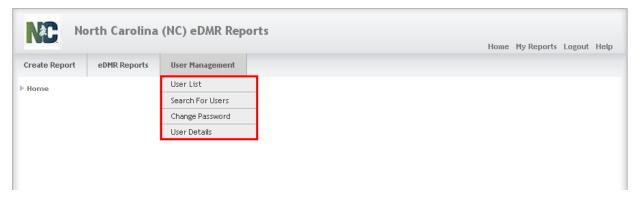
This guide will focus on the (1) User Management section highlighted below.

The sections on Create Reports & eDMR Reports are covered in the Facility Reporting Guide.



If, after reviewing this guide and logging on to the application, you find that the menu option you need to perform your job is not available to you, please consult your administrator.

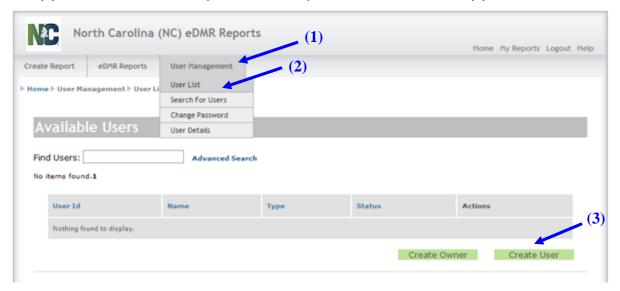
2.2.2 User Management Menu List



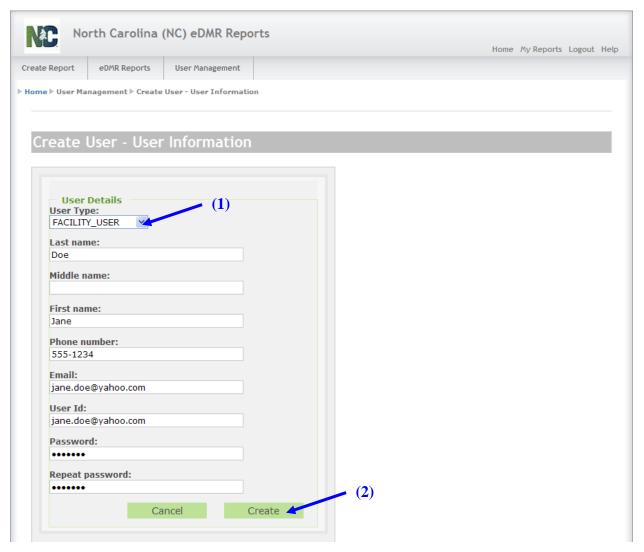
User management options will vary based on the privileges granted to the user. User List and Search For Users are actions available only to Owners and Facility Administrators. Change Password and User Details are available to all users. All of these are covered later in this guide.

2.2.3. User List Screen

To create the Facility Administrator the Owner selects (1) User Management on the menu bar, then (2) User List from the drop down menu options. Then click on the (3) Create User button.



2.2.4 Create and Edit New User – Information and Details Screens



This activity is performed by the Facility Owner to create the User ID for the new Facility Administrator. This information is taken from the "New User" form that the Facility Administrator submitted to the Facility Owner.

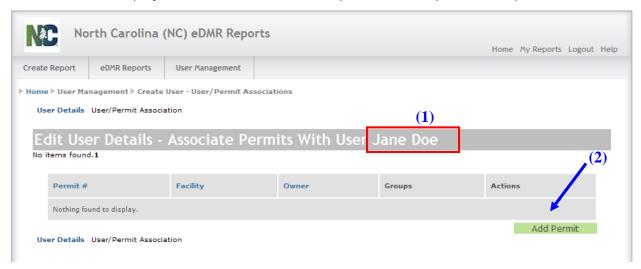
Select (1) FACILITY_USER as User Type.

All fields must be filled in except Middle name, which is optional.

When finished entering all of the information, click on the (2) Create button.

Once the FACILITY_USER has been created, the Facility Administrator will need to assign at least one of the owner permits to their account in the Associate Permits screen. If a permit is not associated with the new user at this step, the user account becomes inaccessible to the owner and facility administrators.

This is the Edit User Details – Associated Permits screen for the user called "Jane Doe" (1). This screen will display after the "Create" button is pressed in the previous step.



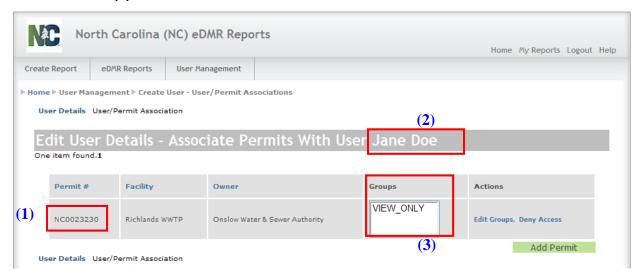
Click on the (2) Add Permit button to associate the first permit(s) to this user.

A popup window will appear with a drop down selection list showing only those permits associated with this facility. Only one permit can be added at a time.

Select the appropriate (1) Permit and then click on the (2) Add Permit button.



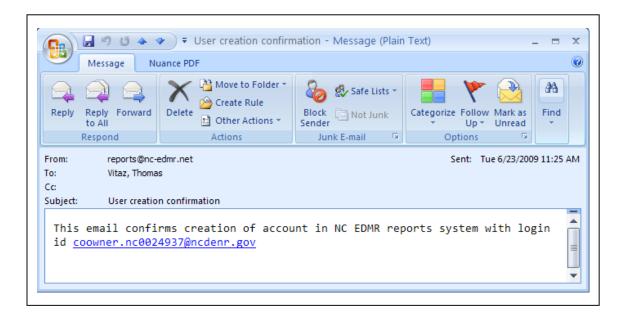
When the (1) Permit # NC0023230 is first associated to the user (2) Jane Doe, the group default value is (3) VIEW_ONLY.



Adding additional privileges will be explained in the steps that follow.

2.2.5 User Creation Confirmation Email

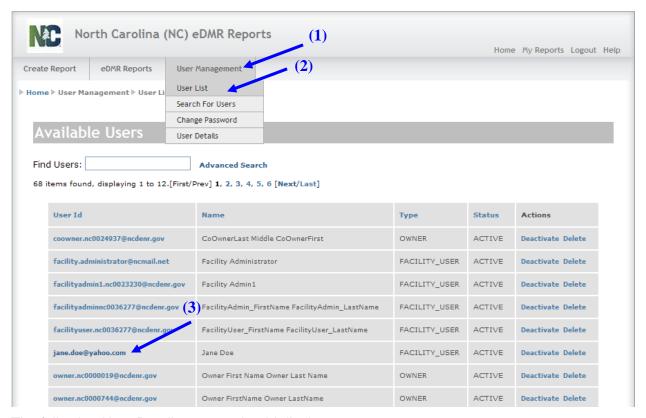
After the user is created, the eDMR application will automatically send an email notification of this to the user. In addition, the Facility Administrator must provide the new user with their credentials in order for the new user to log in.



2.3 Associating Permits to the User.

2.3.1 Available Users Screen

Select (1) User Management, then (2) User List, find and select the (3) User ID you just created.

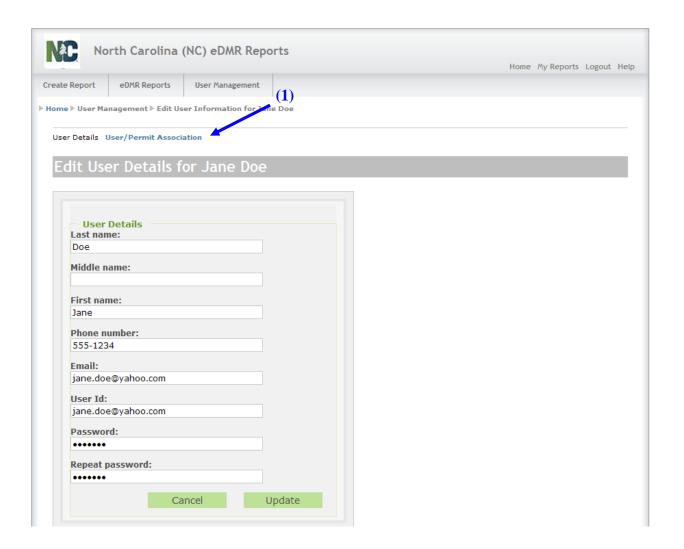


The following User Details screen should display.

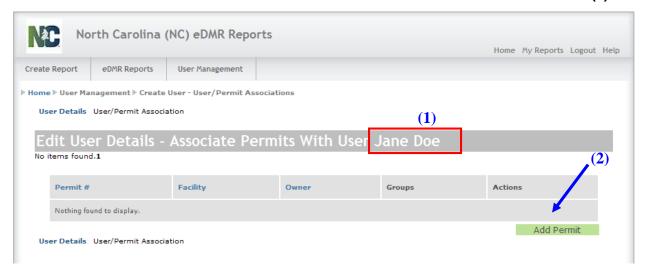
2.3.2 Edit User Details Screen

The Edit User Details screen displays the user information profile just entered. This screen can also be used to perform maintenance on this user's profile information. Each permit must be individually associated to a user.

Click on the (1) User/Permit Association link.



This is the Edit User Details - Associated Permits screen for the user called "Jane Doe" (1).



Click on the (2) Add Permit button to associate the first or additional permit(s) to this user.

2.3.3 Select Permit Popup Window

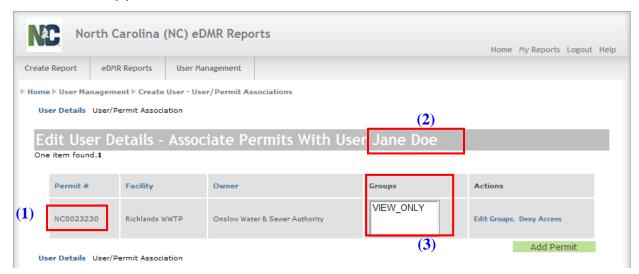
A popup window will appear with a drop down selection list showing only those permits associated with this facility. Only one permit can be added at a time.

Select the appropriate (1) Permit and then click on the (2) Add Permit button.



2.3.4 User Details - Associated Permits Screen

When the (1) Permit # NC0023230 is first associated to the user (2) Jane Doe, the group default value is (3) VIEW_ONLY.



Adding additional privileges will be explained in the steps that follow.

2.4 Creating the Facility Administrator

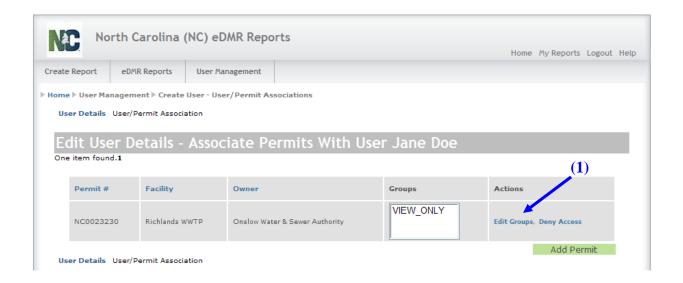
To create a Facility Administrator, just assign the user to the Facility Administrator Group.

Note: Only the Facility Owner can create a Facility Administrator.

2.4.1 User Details - Associated Permits Screen

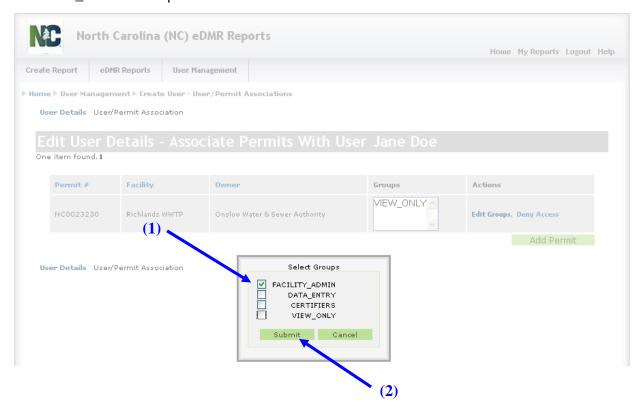
Each user is associated to one or more Groups which define the privileges or permissions this user has. Look at the *User Groups and Privileges Table in section 1.2.1* in this guide for a complete listing.

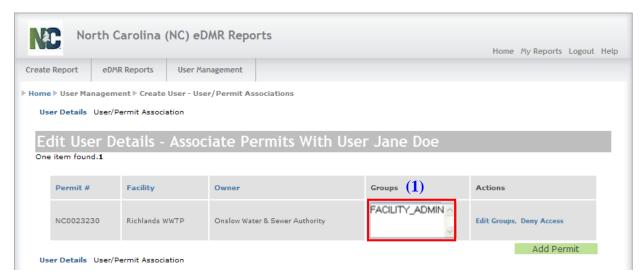
To make a user a "Facility Administrator" it is necessary to change the Groups to which the user is associated. This is done by clicking on the **(1) Edit Groups** link.



2.4.2 Select Groups Popup Window

Place a check mark in the box to the left of **(1) FACILITY_ADMIN** and click on the **(2) Submit** button. Only the Facility Owner has the ability to assign a facility user to the FACILITY_ADMIN Group. A facility administrator cannot assign another facility administrator to the FACILITY_ADMIN Group.





The user now has Facility Administrator privileges, as can be seen in the (1) Groups column.

2.5 Managing User Privileges

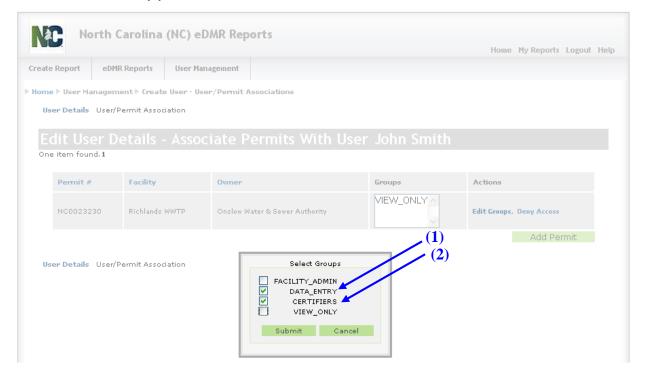
Each User Group has certain privileges associated with it. Please refer to the User Groups and Privileges Table in Section 1.2.1 of this User Guide for detailed information.

Note: Only Facility Owners and Facility Administrators can manage user privileges.

2.5.1 Groups Popup Window

The facility users will be created by either the Facility Owner or Facility Administrator and each user is assigned to Groups based on the privileges needed to perform their activities. Checking or removing the check for each group determines the privileges the user will have in the eDMR application.

In the example below, the facility user John Smith needs permission to perform data entry and certify reports for permit number NC0023230. To grant these privileges, check the boxes for (1) DATA_ENTRY and (2) CERTIFIERS.



The Group privileges are cumulative. If multiple Groups are selected for a user, the system will use the highest privilege. In the example below, if the user was assigned to both (1) VIEW_ONLY and (2) DATA_ENTRY Groups, the user would be able to not only view eDMR reports, but the Data Entry Group privileges includes creation and maintenance of eDMR reports

Having VIEW_ONLY checked does not restrict the user from other associated group's privileges.

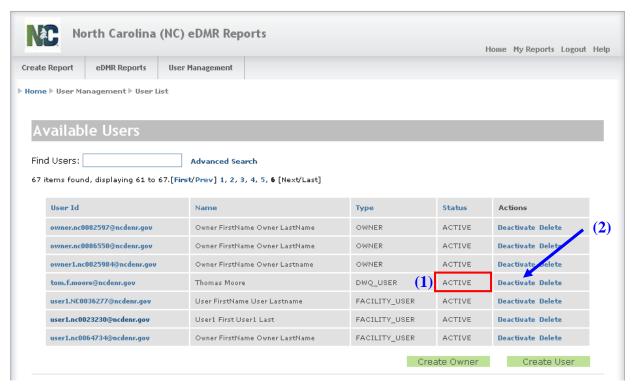


2.6 Managing User Access

2.6.1 Deactivate User - Available Users Screen

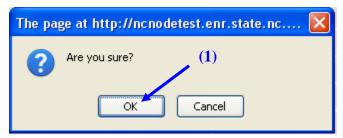
When the user is added to eDMR the (1) User Status is Active. This active status allows the user to login to the system. To prevent the user from logging in to eDMR, change the status to Inactive by clicking (2) Deactivate.

When a user is deactivated, it still exists in eDMR but is Inactive.



Confirm Deactivate Popup Window

Click the (1) OK button to confirm deactivation.



User Deactivation Confirmation Screen

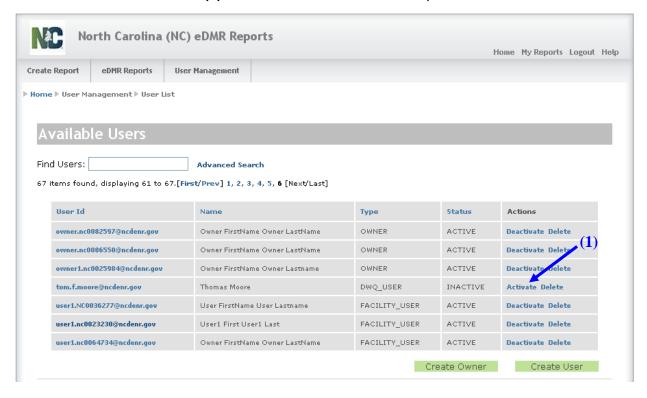
Click the (1) OK button to confirm deactivation.



The user will no longer be able to login to the eDMR system.

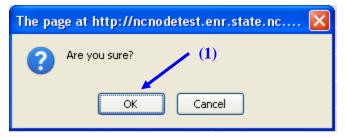
2.6.2 Reactivate User - Available Users Screen

To reactivate a user, click on (1) Activate. This will be a similar process to Deactivation.



Confirm Reactivate Popup Window

Click the (1) OK button to confirm reactivation.



User Reactivation Confirmation Screen

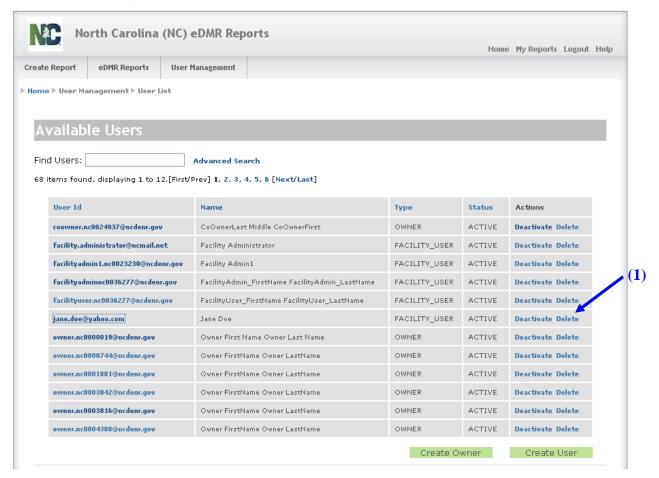
Click the (1) OK button to confirm reactivation.



The user will now be able to login to the eDMR system.

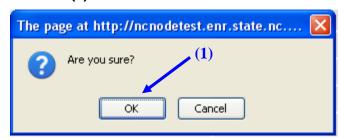
2.6.3 Delete User - Available Users Screen

To delete the user from eDMR click on **(1) Delete**. This will remove the user from eDMR lists. The user is still in the system. If the user has submitted any reports, the user will <u>not</u> be allowed to be deleted from the system.



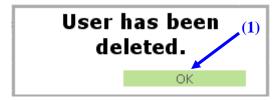
Confirm Delete Popup Window

Click the (1) OK button to confirm deletion.



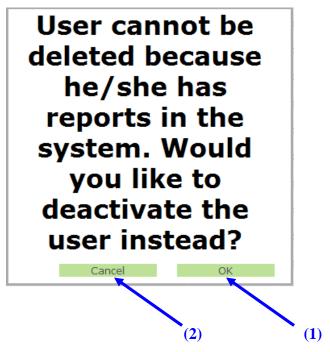
User Delete Confirmation Screen

Click the (1) OK button to confirm deletion.



The user has been removed from the eDMR system.

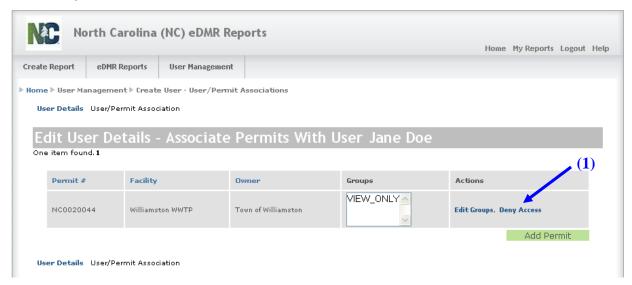
If the user has submitted any reports to eDMR, the user will <u>not</u> be allowed to be deleted from the system. The following message will popup. Click **(1) OK** to deactivate the user. The delete action will be cancelled if the **(2) Cancel** button is clicked.



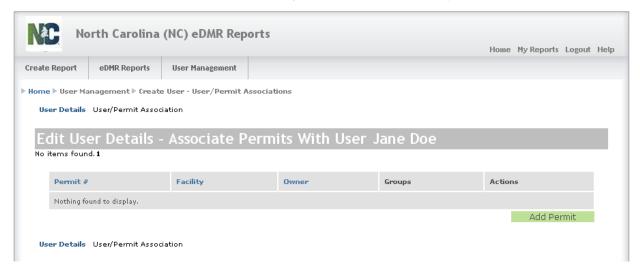
2.6.4 Deny Access to a Permit - Edit User Details Screen

From the Edit User Details Screen click on (1) Deny Access.

This will disassociate the user with the permit. The user and permit still exist in the system, they are no longer associated to each other.



Edit User Details screen after action of Deny Access. There are no permits listed.



2.7. Submitter Privileges for Facility Users

2.7.1 Associating the User with the SUBMITTERS Group

The Submitter is the person at the facility with signatory responsibility. This can be the Owner, Facility Administrator and / or Facility User. **Associating a user to the SUBMITTERS Group can only be performed by the DWR Administrator.** Once the facility user is created, the DWR Administrator should be notified, in writing, that this user has been created in the system and ready to be given Submitters privileges. DWR should also be notified in writing when revocation of privileges is warranted.

2.7.2 User Information Confirmation Email

Whenever a change is made to the user profile, that user will get an email notification that a change has been made.



The DWR Administrator will notify the facility user that Submitters privileges have been granted to them. The change will take effect upon the next user login to the eDMR application.

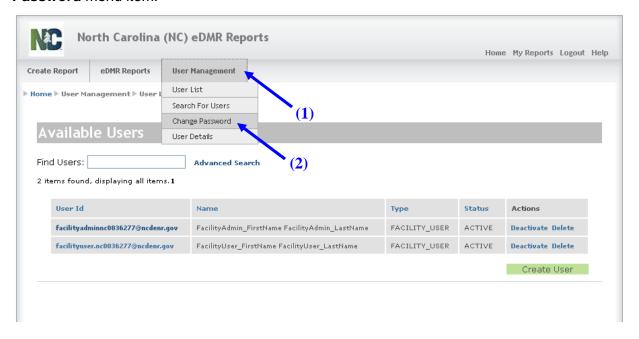
After receiving this email notification the user should login and view their user information profile to see what has been changed.

2.8 Password Change by User

The user has the ability of changing their password at their discretion.

2.8.1 Menu Item Screen

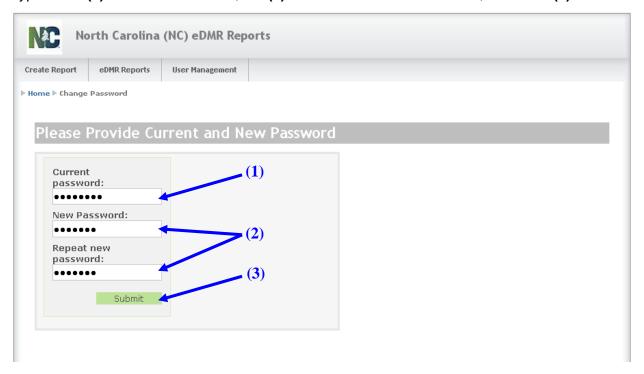
To change the password go to the (1) User Management tab, then click on the (2) Change Password menu item.



2.8.2 Change Password Screen

Passwords consist of at least six characters, including at least one numeric character, and at least one letter. The user will receive a warning after three failed attempts to log in. A user's account is locked after ten failed attempts to log in.

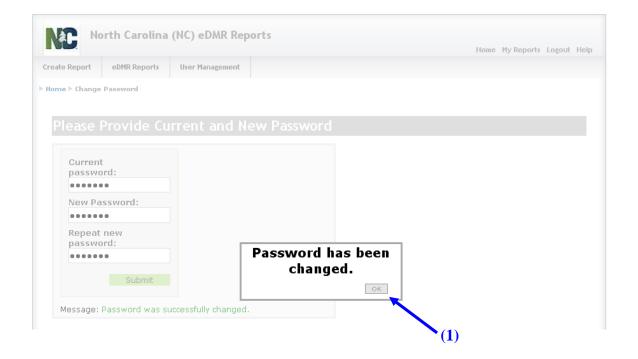
Type in the (1) Current Password, the (2) New Password in both fields, then click (3) Submit.



2.8.3 Password Change Confirmation Popup Screen

Confirmation screen is displayed that the password has been changed.

Click the (1) OK button to proceed to your next activity.



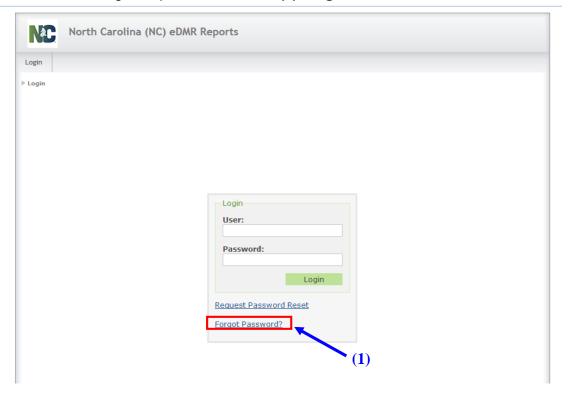
2.9 Email of Forgotten Password

2.9.1 Login / Forgot Password Screen

There are two options available to the user, retrieval or resetting the password.

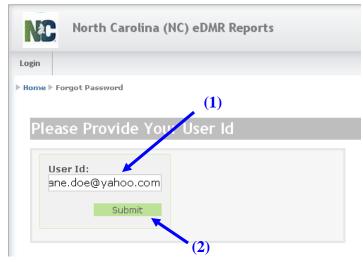
Users can retrieve forgotten passwords by clicking on Forgot Password or get the password reset by clicking on Request Password Reset.

To retrieve the forgotten password click on (1) Forgot Password.



2.9.2 Provide User ID Screen

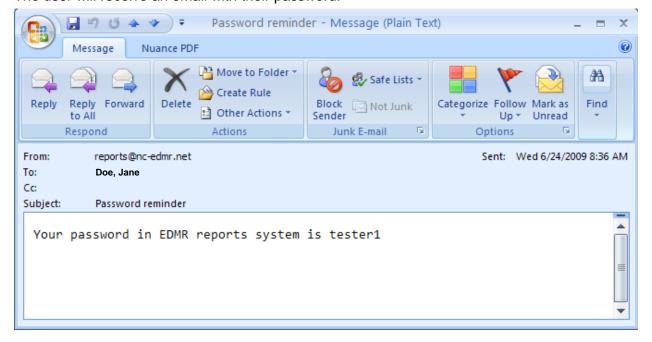
The user must supply their (1) User ID and click the (2) Submit button.



If the user selected 'Forgot Password', the eDMR application will send an automatic email containing the user's current password to the email address specified on the user's account profile.

2.9.3 Email Containing Current Password

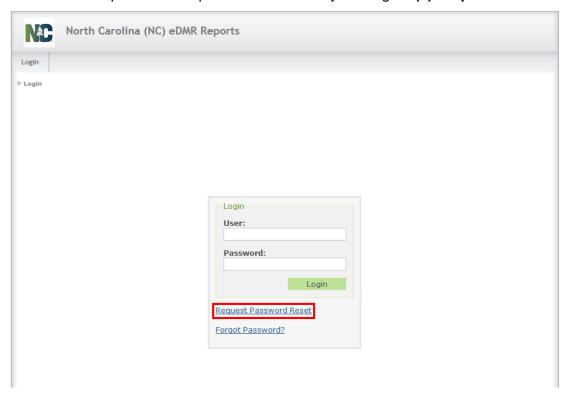
The user will receive an email with their password.



2.10 Request Password Reset

2.10.1 Request Password Reset Screen

The user can request that the password be reset by clicking on (1) Request Password Reset



2.10.2 User ID Screen

The user must supply their (1) User ID and click the (2) Submit button.



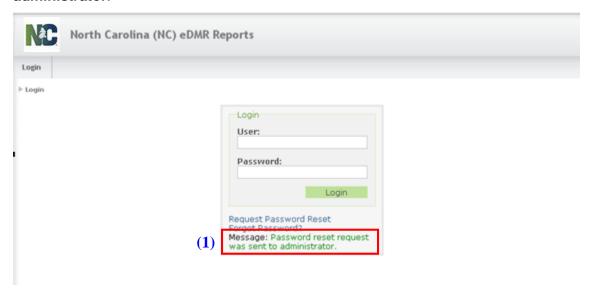
The application will automatically send an email to the facility administrator requesting a password reset.

2.10.3 Password Reset Request Email to the Facility Administrator

Upon receipt of the email for the password reset request, the administrator will perform the password reset and notify the user.

2.10.4 Password Reset Confirmation Notice Screen

The user will see the message that a (1) Password reset request was sent to the facility administrator.

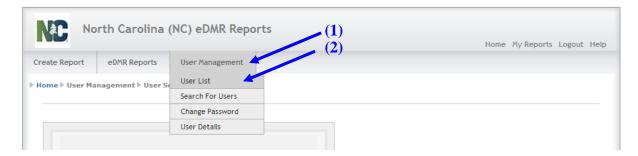


2.11 Locate User Profile and Reset Password

Upon receiving the password reset request, the facility administrator will go to the user's profile and change the password. When this is done, the next time the user logs in, the system will prompt them to change their password. There are two ways to find the user's profile information, generating a list of users or performing a search for a user.

2.11.1 User List Menu

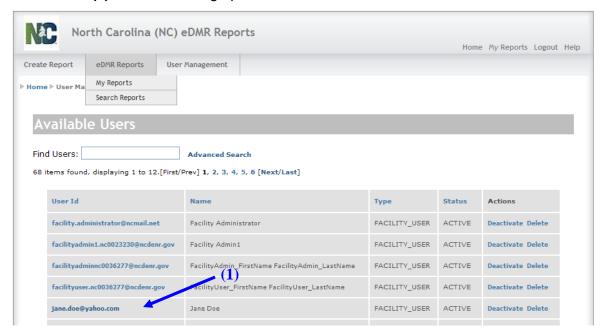
User list provides a list of all users for that facility. This will probably be the easiest way since a facility will usually only have a page or two of users. Select (1) User Management, then (2) User List.



2.11.2 Available Users List Screen

This display shows there are two users, besides the Owner, that have been created for this facility/permit.

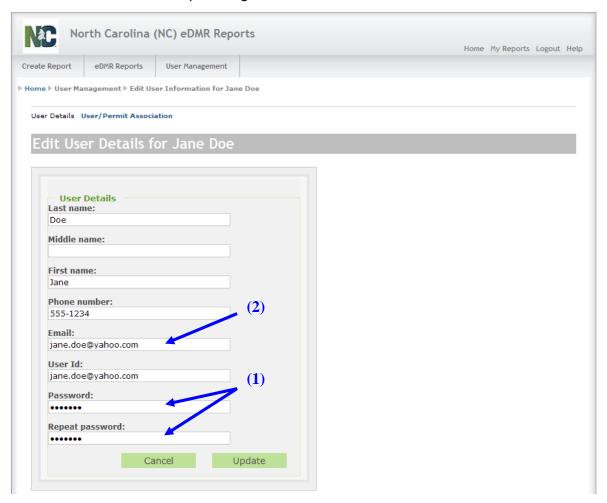
Click on the (1) User ID to bring up the User Details screen for that user.



2.11.3 Edit User Details Screen.

The facility administrator changes the **(1) Password** on the Edit User Details screen. To prevent unauthorized users from gaining access to this account, the new password should not be a standard reset password such as "password1". It should be a new password that is only known by the facility administrator and then sent to the **(2) Email** address on the user's profile.

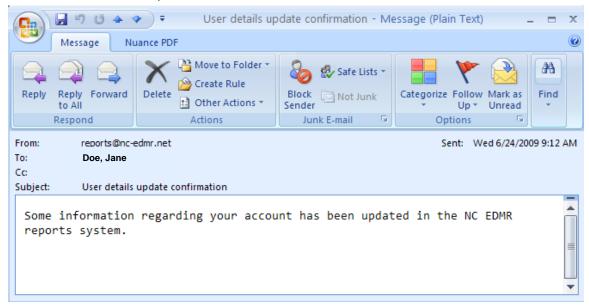
Passwords consist of at least six characters, including at least one numeric character, and at least one letter. The user will receive a warning after three failed attempts to log in. A user's account is locked after ten failed attempts to log in.



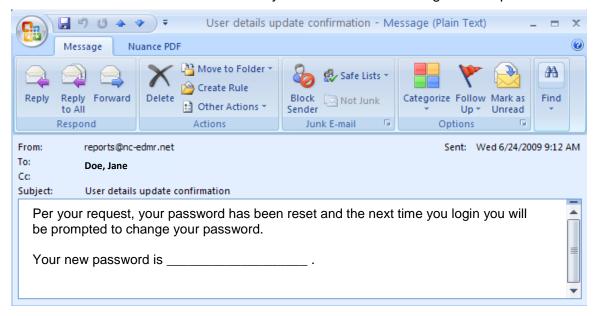
2.11.4 Password Reset Confirmation Emails

The user receives two emails in the Password Reset process.

The first email is automatically generated by the system notifying the user that their profile information has been updated.

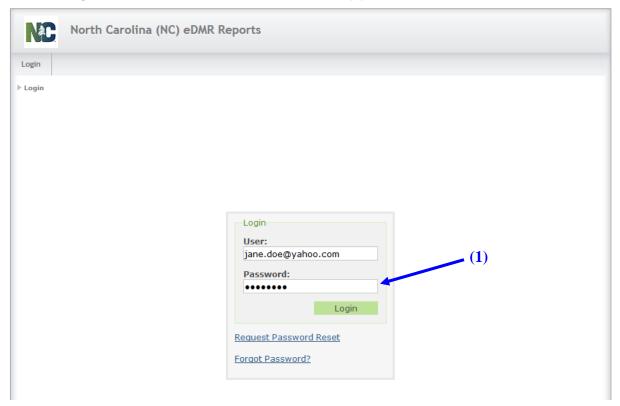


The second email will be from the Facility Administrator containing the new password.



2.11.5 User Login Screen - After Reset

The user logs on in the normal manner with the new (1) Password.

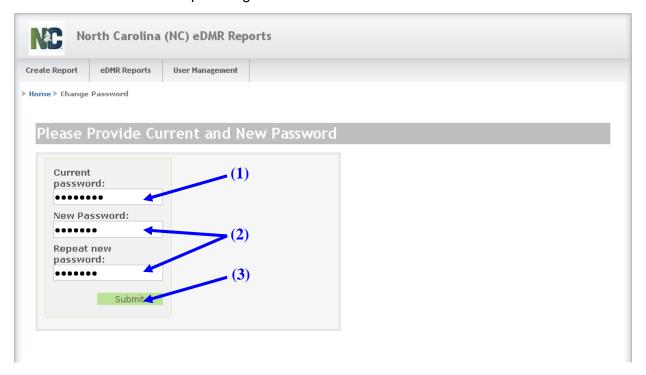


2.11.6 Password Reset - User Password Change Screen

The user will be prompted to change the password at the next login.

Enter the password that was indicated on the password reset email received from the Facility Administrator into the field (1) Current password, then pick a new password and enter it into the (2) New Password fields. Finally, click on (3) Submit.

Passwords consist of at least six characters, including at least one numeric character, and at least one letter. The user will receive a warning after three failed attempts to log in. A user's account is locked after ten failed attempts to log in.



Section 3. Support

If you need help or have any question related to eDMR, don't hesitate to contact us at DWR as specified below.

- Send an e-mail to **Technical Support** at denr.dwq.edmr.help@lists.ncmail.net
- or -
 - Call (919) 807-6429 and ask for Information Processing Unit Staff.